ABSTRACT

The present invention provides methods for automatically generating a will document by providing a user with a plurality of input screens, arranged in a sequential and logical order, that include one or more screens requiring: personal and family information, financial information, asset information, estate distribution selections, trust parameter selection, and guardian and trustee selections and then processing data input by an end-user to automatically create a will document. Preferably, the method also includes selectively precluding a user from viewing a second screen subsequent a first screen until data is entered into said first screen. In certain preferred embodiments, the methods of the present invention will be carried out only after performing a prefatory step of selecting between a plurality of levels of complexity, wherein each level of complexity requires less input data from said input screens, and most preferably there are three levels of complexity.